

# Intel Spring Analyst Meeting 2006



# Intel Spring Analyst Meeting 2006

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Executive Vice President, General Manager, Mobility Group

April 27, 2006





Today's presentations contain forward-looking statements. All statements made that are not historical facts are subject to a number of risks and uncertainties, and actual results may differ materially. Please refer to the printed program materials and to our recent Earnings Release and Form 10-K for more information on the risk factors that could cause actual results to differ.

If we use any non-GAAP financial measures during the presentations, you will find in the printed program materials or on our website, [intc.com](http://intc.com), the required reconciliation to the most directly comparable GAAP financial measure.



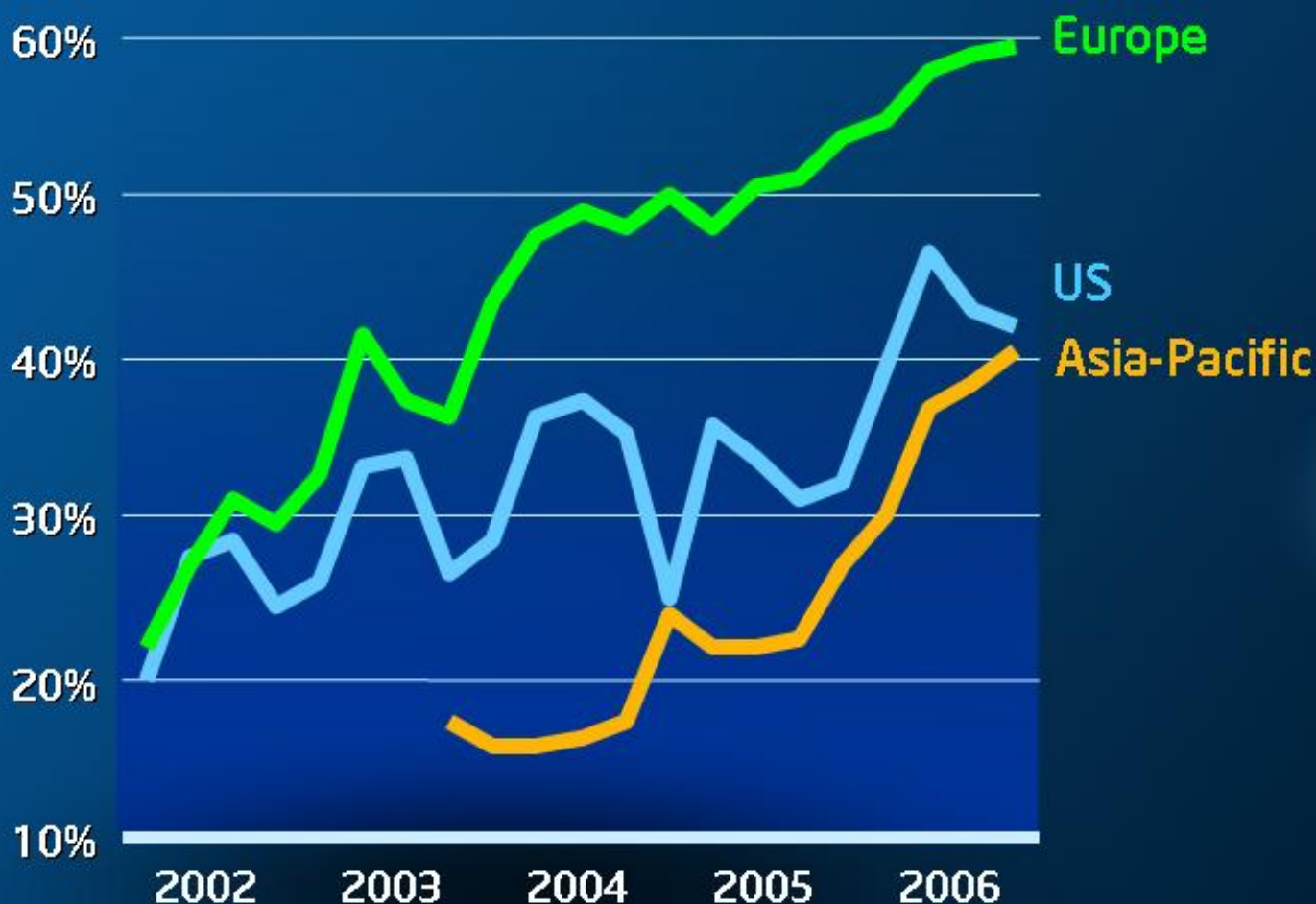
# Mobility Group

- Mobile is the fastest growing PC segment for the next decade
- Intel leadership: now, and in the future



# Notebook Ramp Continues

Notebook as % of Consumer PC Market Segment



Source: Intel. 2006 includes February year-to-date. Asia-Pacific includes corporate through Q4 2004.

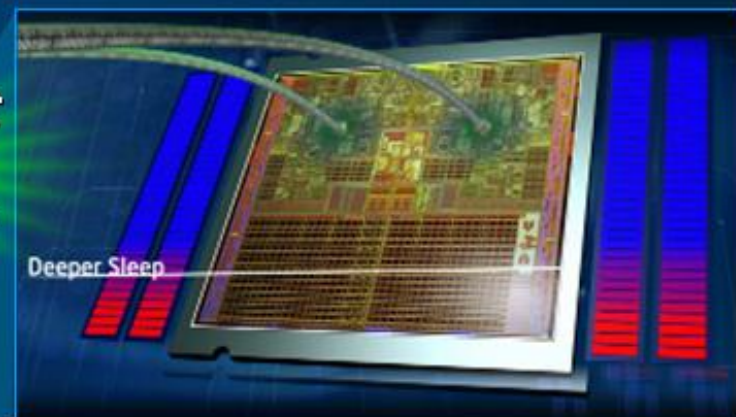


# Intel® Core™ Duo: The Leading Mobile Microprocessor

**1/2** the time

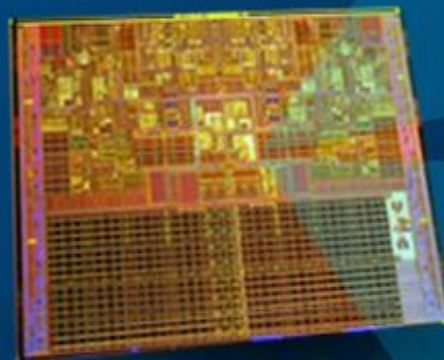
**1/3** the power usage  
iTunes\* music conversion

*Intelligent  
Power  
Capability*

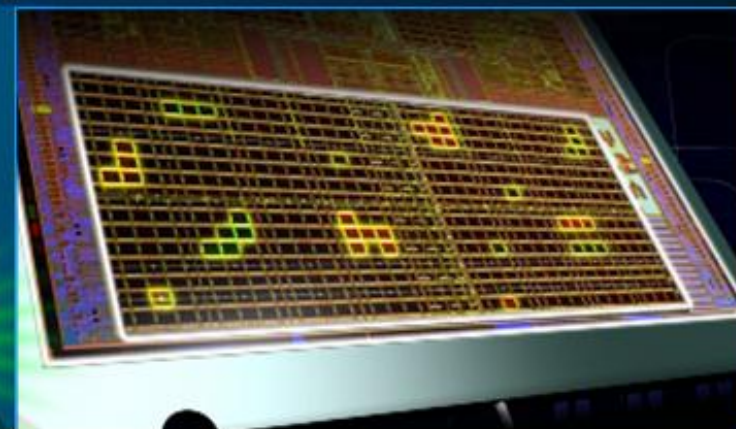


**3/5** the time

**1/3** the power usage  
Adobe\* photo slide  
show & DVD creation



*Advanced  
Smart  
Cache*



**2/3** the time

**1/2** the power usage  
Sony\* PSP\* movie coding





# Centrino® Duo 2006 (Napa): "No Compromises" Dual Core Transition



Processor



*World's First Low  
Power, Mobile Dual Core  
Microprocessor*

Chipset



Mobile  
Intel 945  
Express Chipset  
Family

*Lowest Active Power  
Integrated Graphics*

Wireless LAN



Intel PRO/  
Wireless  
3945ABG  
Network  
Connection

*Lower Component Count  
Better Performance in  
Noisy Environment  
Less Power for Idle  
Association*

*Platform  
Bottom Line  
(vs. 2005)*

**70% More  
Performance**

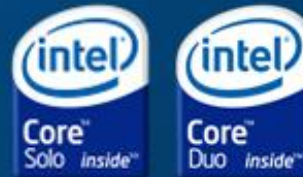
**28% Less  
Power Usage**

**30% Smaller  
Footprint**

**260  
Design Wins**



# Intel Takes This Lead to Every Form Factor



*Intel Fits Where  
Others Cannot*  
**Chipset**



**Transportable/  
Full Size  
85-150W**

**Dual Core**

**Mobile 945 PM  
Mobile 945 GM**



**Thin and Light  
40-50W**

**Dual Core  
& Dual Core  
Low Voltage**

**Mobile  
945 GM**



**Mini-Notebook  
20-30W**

**Dual Core  
Low & Ultra Low  
Voltage**

**Mobile  
945 GMS  
Small Form Factor**



**Sub-Notebook/  
Tablet  
10-20W**

**Single &  
Dual Core  
Ultra-Low  
Voltage**

**Mobile  
945 GMS  
Small Form Factor**



# Lead Extends as Merom Ships in August

*"Drop In" Replacement for Core™ Duo in Centrino® Duo Platforms*

**>2X** the performance  
of 2005 Pentium® M  
(Dothan)

**>20%**  
performance gains  
over Intel® Core™ Duo

**No Compromises**  
battery life and  
form factor neutral

**Ops  
Fusion**



**64-Bit**



**4 MB  
Shared  
Cache**

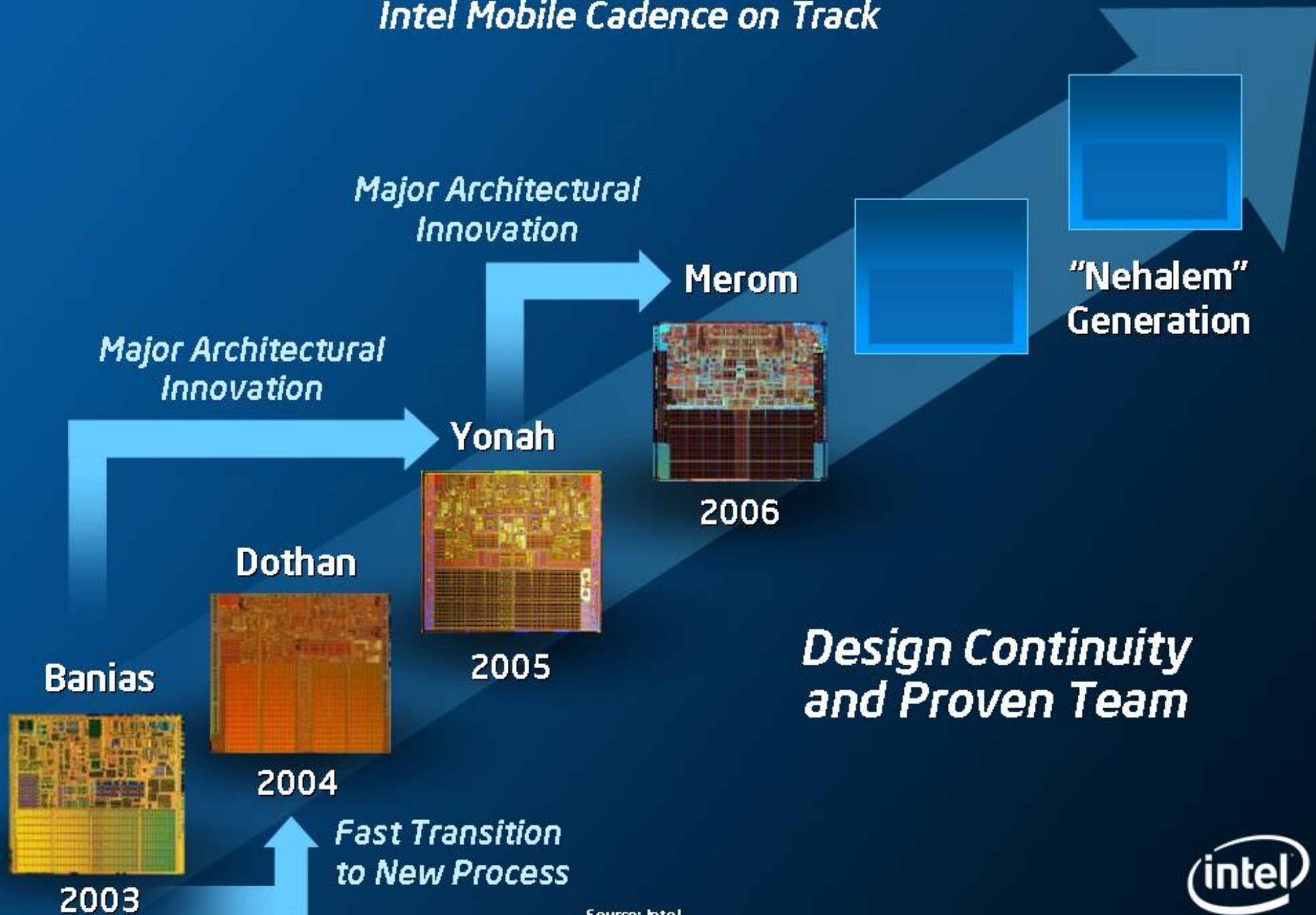


Source: Intel See back-up for system configurations and other important legal information  
Performance comparisons based on pre-production Merom products.



# Intel Processor Leadership Will Continue

*Intel Mobile Cadence on Track*



Source: Intel





# Santa Rosa 2007: Another Leadership Platform

## Santa Rosa

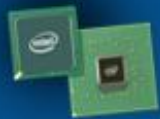
Processor



Merom  
Dual Core  
Processor

*>20% Better Performance  
With No Increase in Average  
Power*

Chipset



Crestline  
ICH8M

*Integrated Graphics  
Performance/Power  
Leadership*

Wireless LAN



Kedron

WiMAX  
Options

*802.11n MIMO  
More Wireless Options*

Intel NAND



Robson

*1/2 the Boot Time,  
Faster App Launch → At  
Lower Platform Power*



# New Mobile Categories: Intel Extends Leadership into Smaller Form Factors

*Step 1: Dramatically Reduce Power*

Napa/Santa Rosa Platform

Ultra Low Voltage/  
Small Form Factor

"Alpha"  
Platform

"Baker"  
Platform

"Charlie"  
Platform



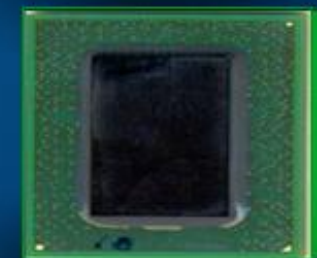
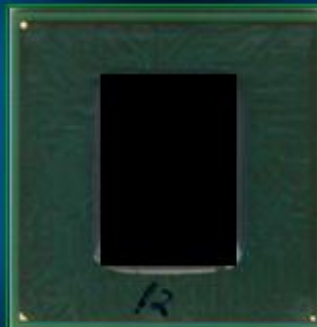
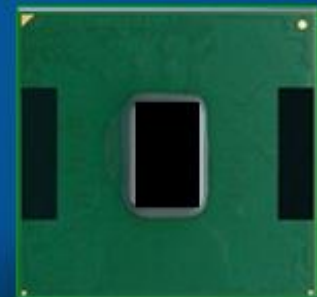
Source: Intel Components include CPU and chipset.



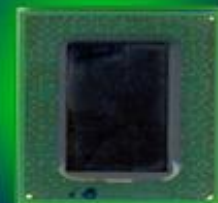


# New Mobile Categories: Intel Extends Leadership into Smaller Form Factors Step 2: Design Smaller Chips

2006  
Standard Products



2006  
Small Form Factor Products  
70% Reduction



2007 and Beyond  
90% Reduction

Integration  
Packaging  
Reduction  
Moore's Law  
Density  
Improvements

Source: Intel. Three products shown are Dothan microprocessor, Calistoga and KH-7 integrated graphics chipsets.  
2006 products shown in relative proportion. 2007 and beyond 90% reduction based on Intel process and design roadmap and plans.



A world map with a blue background. Landmasses are outlined in white. The map shows the distribution of Fixed WiMAX First Year Ramp Matching DSL coverage across the globe. The coverage is concentrated in North America, Europe, and parts of Asia and South America. The map is titled "Fixed WiMAX First Year Ramp Matching DSL" in white text at the top.



A world map with a focus on South America. Brazil is highlighted in a darker shade of gray, indicating the location of the study area. Other countries in South America are shown in a lighter gray, and the rest of the world is in white.



100



# Intel's Leadership Across All Mobile Internet Devices

*No Gaps, No Holes*



17"

Full PC Capability

3"

Sub 3"

CPU

Chipset

Wi-Fi/WiMAX

Brand

1. *Platform Architectural Leadership*

2. *Performance Leadership*

3. *Power Leadership*



*Smartphone Processor Leadership*



# Mobility Group

- Mobile is the fastest growing PC segment for the next decade
- Intel leadership: now, and in the future





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# Slide 4: Configuration Details

**Source: Principled Technologies\*.**

**Configuration: Intel® Core™ Duo T2300 (1.66 GHz, 2MB L2, 667MHz FSB)** with Mobile Intel® 945GM Express Chipset in Acer\* TravelMate\* TM4202WLMi-XP Pro, BIOS Acer V1.30, Graphics Intel® Graphics Media Accelerator (GMA) 950 with 224MB Dynamic Video Memory Technology shared memory, graphics driver Intel® 6.14.10.4436, Memory 1GB (2x512) Samsung M4 70T6554CZ3-CD5 DDR2-PC4200 4-4-4-11, Weight 6lbs, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9100824A 5400rpm.

**AMD\* Turion\* ML-34 (1.8 GHz, 1GB L2)** with ATI\* RS482 Chipset in Acer\* TravelMate\* TM4404WLMi, Graphics integrated ATI\* Mobility RADEON\* X700 with 64MB, graphics driver ATI\* 6.14.10.6525, Memory 1GB (2x512MB) Hyundai Electronics HYMD564M646B6-J PC2700 DDR333 2.5-3-3-7, Weight 5lbs 15oz, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9120824A 4200rpm. **All Platforms:** Microsoft\* Windows\* XP Professional\* Build 2600 on FAT32 file system, Microsoft\* DirectX\* 9.0c, Power Management set to Portable/Laptop for AMD\* platform Acer ePower Management Word Processing, Screen size 15.4" WXGA TFT (1280X800, 32 Color)







# Slide 4: Configuration Details

## Digital Home: Music on-the-go

Uncompressed audio file (.wav) is being converted to compressed format (.mp3) for on-the-go listening. Uncompressed audio gives you the highest quality listening experience but is not a convenient format for taking with you on the road. The Intel® Core™ Duo processor has the capability to deliver real time savings and reduced power consumption while you engage in all your favorite digital lifestyles.

## Apple\* iTunes\* 6.0.3



**Source:** Principled Technologies\*. Configuration: Intel® Core™ Duo T2300 (1.66 GHz, 2MB L2, 667MHz FSB) with Mobile Intel® 945GM Express Chipset in Acer\* TravelMate\* TM4202WLMi- XP Pro, BIOS Acer V1.30, Graphics Intel® Graphics Media Accelerator (GMA) 950 with 224MB Dynamic Video Memory Technology shared memory, graphics driver Intel® 6.14.10.4436, Memory 1GB (2x512) Samsung M4 70TB554CZ3-CD5 DDR2-PC4200 4-4-4-11, Weight 6lbs, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9100824A 5400rpm. AMD\* Turion\* ML-34 (1.8 GHz, 1GB L2) with ATI\* RS482 Chipset in Acer\* TravelMate\* TM4404WLMi, Graphics integrated ATI\* Mobility RADEON\* X700 with 64MB, graphics driver ATI\* 6.14.10.6525, Memory 1GB (2x512MB) Hyundai Electronics HYMD564M646B6-J PC2700 DDR333 2.5-3-3-7, Weight 5lbs 15oz, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9120824A 4200rpm. **All Platforms:** Microsoft\* Windows\* XP Professional\* Build 2600 on FAT32 file system, Microsoft\* DirectX\* 9.0c, Power Management set to Portable/Laptop for AMD\* platform Acer ePower Management Word Processing, Screen size 15.4" WXGA TFT (1280X800, 32 Color)

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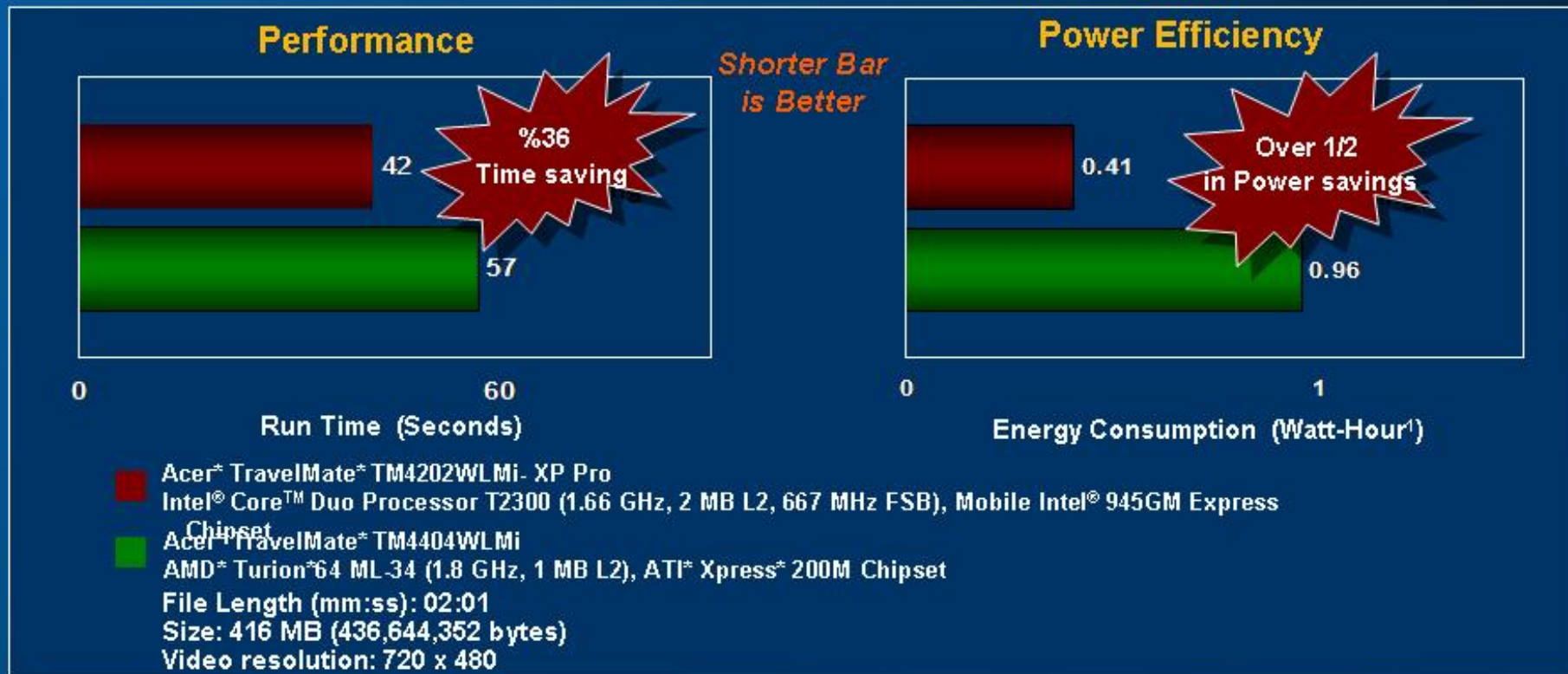


# Slide 4: Configuration Details

## Digital Home: Video on-the-go

Preparing movie files for viewing on a portable device (PSP). Transcoding a video file (.avi) to a portable format (PSP) is a time consuming process. The Intel® Core™ Duo processor has the capability to deliver real time savings and reduced power consumption while you engage in all your favorite digital lifestyles.

## InterVideo® iVideoToGo® for PSP



**Source:** Principled Technologies\*. Configuration: Intel® Core™ Duo T2300 (1.66 GHz, 2MB L2, 667MHz FSB) with Mobile Intel® 945GM Express Chipset in Acer® TravelMate® TM4202WLMi- XP Pro, BIOS Acer V1.30, Graphics Intel® Graphics Media Accelerator (GMA) 950 with 224MB Dynamic Video Memory Technology shared memory, graphics driver Intel® 6.14.10.4436, Memory 1GB (2x512) Samsung M4 70T6554CZ3-CD5 DDR2-PC4200 4-4-4-11, Weight 6lbs, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9100824A 5400rpm. **AMD® Turion® ML-34 (1.8 GHz, 1GB L2)** with ATI® RS482 Chipset in Acer® TravelMate® TM4404WLMi, Graphics integrated ATI® Mobility RADEON® X700 with 64MB, graphics driver ATI® 6.14.10.6525, Memory 1GB (2x512MB) Hyundai Electronics HYMD564M646B6-J PC2700 DDR333 2.5-3-3-7, Weight 5lbs 15oz, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9120824A 4200rpm. **All Platforms:** Microsoft® Windows® XP Professional® Build 2600 on FAT32 file system, Microsoft® DirectX® 9.0c, Power Management set to Portable/Laptop for AMD® platform Acer ePower Management Word Processing, Screen size 15.4" WXGA TFT (1280X800, 32 Color)

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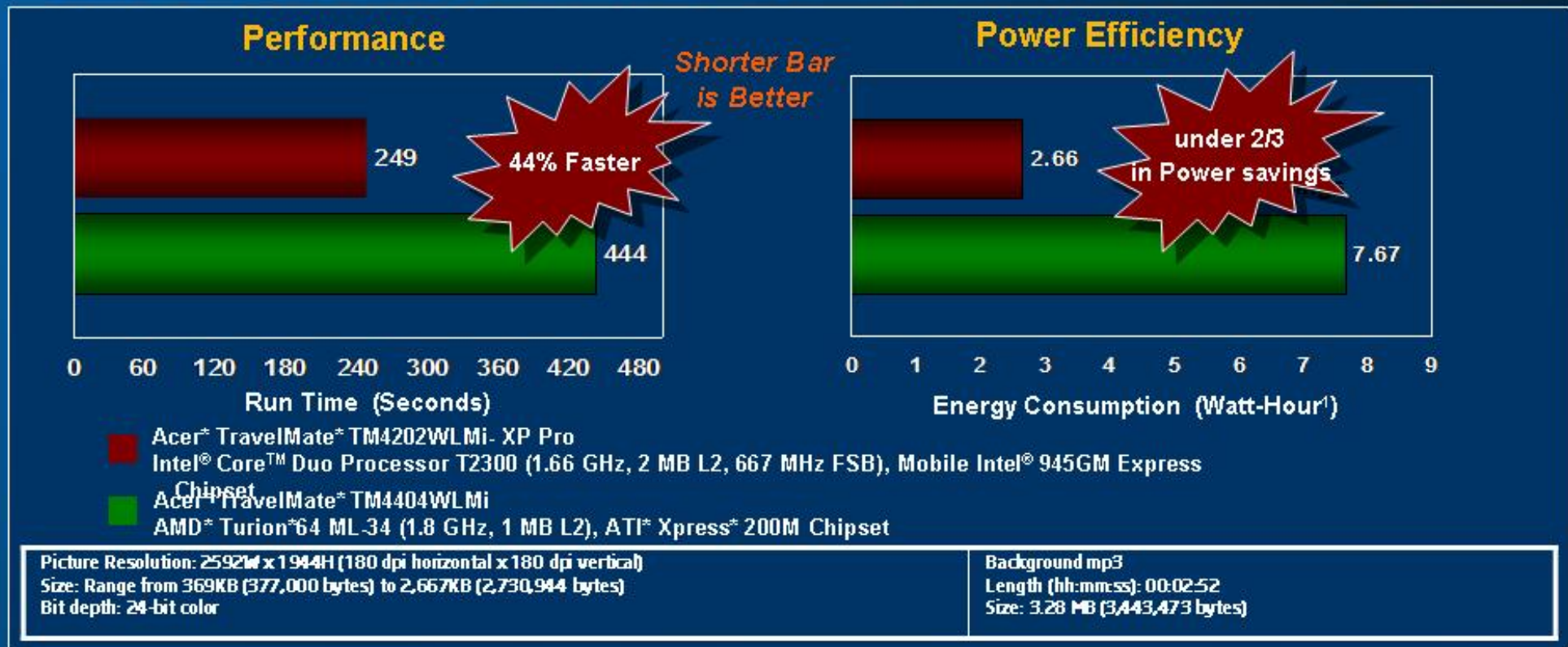


# Slide 4: Configuration Details

## Digital Home: Digital slide show

Creating slide show using Adobe® Photoshop® Elements and creating DVD using Adobe® Premier Elements®. The Intel® Core™ Duo processor has the capability to deliver real time savings and reduced power consumption while you engage in all your favorite digital lifestyles.

## Adobe® Photoshop Elements® 4.0 and Premiere Elements® 2.0



**Source:** Principled Technologies®. Configuration: Intel® Core™ Duo T2300 (1.66 GHz, 2MB L2, 667MHz FSB) with Mobile Intel® 945GM Express Chipset in Acer® TravelMate® TM4202WLMi- XP Pro, BIOS Acer V1.30, Graphics Intel® Graphics Media Accelerator (GMA) 950 with 224MB Dynamic Video Memory Technology shared memory, graphics driver Intel® 6.14.10.4436, Memory 1GB (2x512) Samsung M4 70T6554CZ3-CD5 DDR2-PC4200 4-4-4-11, Weight 6lbs, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9100824A 5400rpm. AMD® Turion® ML-34 (1.8 GHz, 1GB L2) with ATI® RS482 Chipset in Acer® TravelMate® TM4404WLMi, Graphics integrated ATI® Mobility RADEON® X700 with 64MB, graphics driver ATI® 6.14.10.6525, Memory 1GB (2x512MB) Hyundai Electronics HYMD564M646B6-J PC2700 DDR333 2.5-3-3-7, Weight 5lbs 15oz, Hard disk 120GB Ultra ATA 100 Momentus Seagate ST9120824A 4200rpm. **All Platforms:** Microsoft® Windows® XP Professional® Build 2600 on FAT32 file system, Microsoft® DirectX® 9.0c, Power Management set to Portable/Laptop for AMD® platform Acer ePower Management Word Processing, Screen size 15.4" WXGA TFT (1280x800, 32 Color). Performance tests and ratings are measured using specific systems and/or components and reflect approximate performance of Intel products as measured by those tests. Any difference in system hardware, software, or configuration may affect actual performance. Buyers should consult other sources of information to evaluate performance of systems or components they are considering purchasing. For more information on performance tests and performance of Intel products, visit <http://www.intel.com/performance/resources/limits.htm>.

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# Slide 6: Configuration Details

<b>Motherboard and CPU</b>	<ol style="list-style-type: none"> <li>1. Intel® reference motherboard based on Mobile Intel® 915 chipset with Intel® Pentium® M Processor 780 (2.26 GHz, 2MB L2, 533MHz FSB) and BIOS S0N0MA01.86 C.0051.D.0410181711</li> <li>2. Intel® reference motherboard based on Napa chipset with Yonah Dual Core Processor (Shared 2MB L2, 667MHz FSB) and BIOS NAPA0001.86 C.0024.D.0504121424</li> </ol>
<b>Memory Size</b>	<ol style="list-style-type: none"> <li>1. 1 GB (2 x 512MB DIMMs) Infineon® DDR2-533 (4-4-4-12)</li> <li>2. 1 GB (2 x 512MB DIMMs) Infineon® DDR2-667 (5-5-5-15)</li> </ol>
<b>Graphic Adapter (2D/3D)</b>	<ol style="list-style-type: none"> <li>1. Intel® Graphics Media Accelerator 900 with Torisan® 150SP-02-L02 LCD display</li> <li>2. Intel® Graphics Media Accelerator 950 with Torisan® 150SP-02-L02 LCD display</li> <li>3. ATI Graphics Driver Version 8.07 (Used in Gaming &amp; Video Encode MCCB)</li> </ol>
<b>Chipset Inf File</b>	<ol style="list-style-type: none"> <li>1. Intel® Chipset Installation Utility (INF) 6.1.0.1008</li> <li>2. Intel® Chipset Installation Utility (INF) 7.1.0.1006</li> </ol>
<b>Hard Disk</b>	Hitachi® Travelstar® HTS726060M9AT00 60 GB IDE ATA-6 (7200 RPM, 8MB cache)
<b>Graphics Driver</b>	<ol style="list-style-type: none"> <li>1. Mobile Intel® 915GM, 910ML, 915MS Express Chipset Family 6.14.10.3872</li> <li>2. Napa Chipset Family 6.14.10.4017</li> </ol>
<b>Sound Card</b>	Sound Blaster Audigy Gamer® - 5.12.01.0129
<b>Network Card</b>	<ol style="list-style-type: none"> <li>1. Integrated Intel® PRO/100 VM LAN - 8.0.2.0</li> <li>2. Integrated Intel® PRO/1000 PM LAN - 8.4.20.0</li> </ol>
<b>Resolution / Colors</b>	1024 x 768 32-bit color
<b>Operating System</b>	Windows XP Professional Edition (NTFS partition, 32-bit File System) with SP2
<b>DirectX Support</b>	Default Microsoft DirectX® 9.0c
<b>ATA Driver</b>	Windows® Default



# Slide 7: Configuration Details

System Specifications	YonahC0/Calistoga A3Rework	MeromB0/Calistoga A3Rework	MeromB0/Calistoga A3Rework
Board/System	CRB1: JC-calistoga CRB Fab2 w/A3 reworked CRB2: CV-calistoga fab5 w/ A3 rework	CV-calistoga fab5 w/ A3 rework	CV-calistoga fab5 w/ A3 rework
P/N /Fab	CRB1: PBA C82388-202 → AXR-C75289-512, 108306 CRB2: PBA C75289-502 → AXR-C75289-512, 108030	PBA C75289-502 → AXR-C75289-512, 108030	PBA C75289-502 → AXR-C75289-512, 108030
S/N	CRB1: IWJC53600012, CRB2: IWCA52804049	IWCA52804049	IWCA52804049
SBIOS Vendor/Version	52	58 w/microcode 8027(custom)	58 w/microcode 8027
KSC Version	1.15	1.16	1.16
Operating System	WinXP-SP2, QFE, Enablefix.reg	WinXP-SP2, QFE, Enablefix.reg	WinXP-SP2, QFE, Enablefix.reg
OS Build	5.1.2600 SP2	5.1.2600 SP2	5.1.2600 SP2
OS Image File (Date)	JC_BOB_3.GHO dated 7/22/05, updated video driver to 4421, Inf-1014, audio-5011, QFE, Enablefix.reg	JC_BOB_6.GHO	JC_BOB_6.GHO
File System	NTFS	NTFS	NTFS
DirectX Version	9.0c	9.0c	9.0c
Processor /Stepping	Yonah C0	Merom B0	Merom B0







# Intel Spring Analyst Meeting 2006

Don MacDonald

Vice President and General Manager | Digital Home Group

April 27, 2006



# Key Messages

- Consumer PC Growth >10% in 2006\*
- Pursuing PC and Adjacent Growth Opportunities
- Intel Has a Winning Roadmap
- Positioned to Gain MSS in 2006

Sources: \*Gartner, IDC



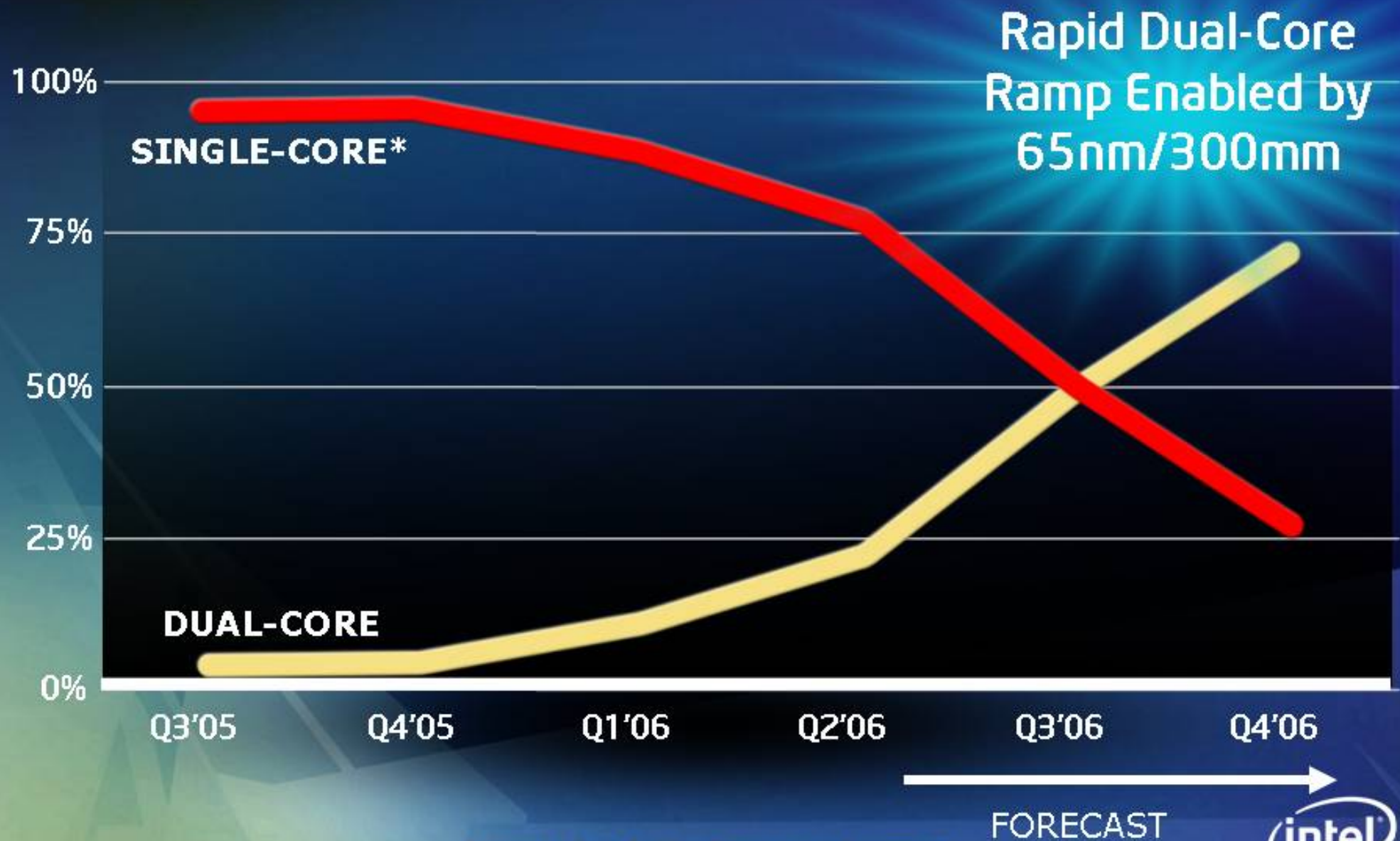


# Consumer PC Growth Actions

- Proliferate Dual Core Everywhere
- Win with Platforms: Intel® Viiv™ Technology as the Premier Consumer PC Platform
- Win High End Gaming
- Win Entry Segment
- Make Low Power an Advantage



# Rapid Dual Core Ramp





# New Consumer PC Baseline for Digital Entertainment

**Chipsets**



**Dual Core Processors**



**Network Drivers**



Ease of Use  
Connectivity  
Performance that  
Delivers  
New Experiences

**Intel Software  
and Drivers**

Intel®  
Quick Resume  
Technology

Intel®  
Matrix Storage  
Technology

Intel®  
High Definition  
Audio

**Content Service  
Providers**





# What Is Intel® Viiv™ Technology?

Connected  
Devices  
10'UI Services & Apps

**Ecosystem of Entertainment Devices**  
(digital media adapters, connected TVs, set-top boxes,  
portable media players, routers, etc.)  
**Entertainment Services**  
(music, movies, video, games, and creativity)

Hardware & Operating  
System

Media Shell and Remote Control

Intel Software &  
Drivers

**Intel Drivers**  
Instant on/off  
(after initial boot)  
**Surround -  
Sound Audio  
RAID  
Graphics  
LAN**

**Network  
Software**  
Router setup;  
Network mgmt;  
Device setup

**Media Server**  
Content  
aggregation;  
Transcoding  
Engine;  
**DTCP-IP**

Intel Silicon

Intel® Pentium® D proc;  
Intel Pentium proc  
Extreme Edition;  
Intel® Core™ Duo

Intel® 955X and 945G/P  
Express Chipsets;  
Mobile Intel® 945  
Express Chipset

Intel® PRO/1000 PM  
Network Connection  
Intel® PRO/100 VE/VM  
Network Connection

Home networking requires additional devices, software or services. May require TV tuner card and/or remote which may be sold separately. Instant on/off feature works after initial boot, when activated. System performance will vary depending on your hardware and software configurations. Intel's network set-up software currently only supports DHCP ("Always On") and PPPoE broadband connectivity protocols. PPPoA, PPTP and other protocols require use of router manufacturer's network set-up software. Check verified router specifications against Internet provider requirements before purchasing.





# Intel® Viiv™ Technology Ecosystem

**INTEL® VIV™  
TECHNOLOGY  
BRANDED PCS**



Enjoy  
with



**CONNECTED  
DEVICES**

**SERVICES &  
APPS**

Enjoy  
with



# Comments and Responses

**"Ranks as a phenomenally ho-hum product"**

**"Intel's Hard-to-Define Viiv Doesn't Live Up to the Hype"**

**"Confusion about content alliances and content availability"**

**"Quick Resume doesn't put a Viiv computer in any sleep mode; it just turns off the display and speakers"**

**"Intel Viiv Instant On Isn't Instant On At All"**

**"Does software release 1.5 make things easier/better for the average consumer"**

**"Will bring more features, and that the best Viiv devices are yet to come"**





# Intel® Viiv™ Technology vs. Non-Intel

ENABLED FEATURE	WITH INTEL® VIIV™ TECHNOLOGY	WITHOUT IVT
• Network Setup	☑ <b>Less techno-jargon, can use remote</b>	SSID, WEP, WPA confusion not via remote
• Device Setup	☑ <b>Simple 4 digit PIN</b>	Techno-jargon confusion
• Transcoding	☑ <b>Supports ~20 formats</b>	Not always supported
• Streaming of Content	☑ <b>Any IVT-Verified device, consumer choice</b>	Different media server for each device
• Instant On/Off	☑ <b>Resume remotely</b>	Not fully supported
• Media Server Catalogs all Content in Network (UPnP)	☑ <b>Standard with IVT</b>	Not done easily, if at all
• Verification of Content and Services	☑ <b>Tested and verified; logo ID</b>	No IVT platform testing
• IVT Exclusive Content	☑ <b>Access IVT exclusive content</b>	Cannot access without IVT

Includes features coming in 2H'06

Home networking requires additional devices, software or services. May require TV tuner card and/or remote which may be sold separately. Instant on/off feature works after initial boot, when activated. System performance will vary depending on your hardware and software configurations. Intel's network set-up software currently only supports DHCP ("Always On") and PPPoE broadband connectivity protocols. PPPoA, PPTP and other protocols require use of router manufacturer's network set-up software. Check verified router specifications against Internet provider requirements before purchasing.





# DESIGNS **WORLDWIDE**

 Shuttle

**HITACHI**  
Inspire the Next

 LG

**NEC**

**MEDION**

  
winner

**DELL**

**SONY**

*lenovo*

 FUJITSU

  
Gateway

*acer*

 intel

 **SUNG-JU**  
international co., ltd.

*Packard Bell.*

**TCL**

**SAMSUNG**

 VIV<sup>TM</sup>

**POGSAU**  
peoples partnership service

 **hp**  
invent

TG 삼보컴퓨터

**LuComs**  
DAEWOO



# Movies+TV



# Music



# Games



# Creativity



\*Other names and brands may be claimed as the property of others

# Intel® Viiiv™ Technology Ramp

## Off To A Fast Start

1st 3 months  
unit shipments

Pentium® 4  
Processor



Pentium® D  
Processor



Centrino® Mobile  
Technology



Intel® Viiiv™  
Technology



Source: Intel





# Performance For High End Gaming



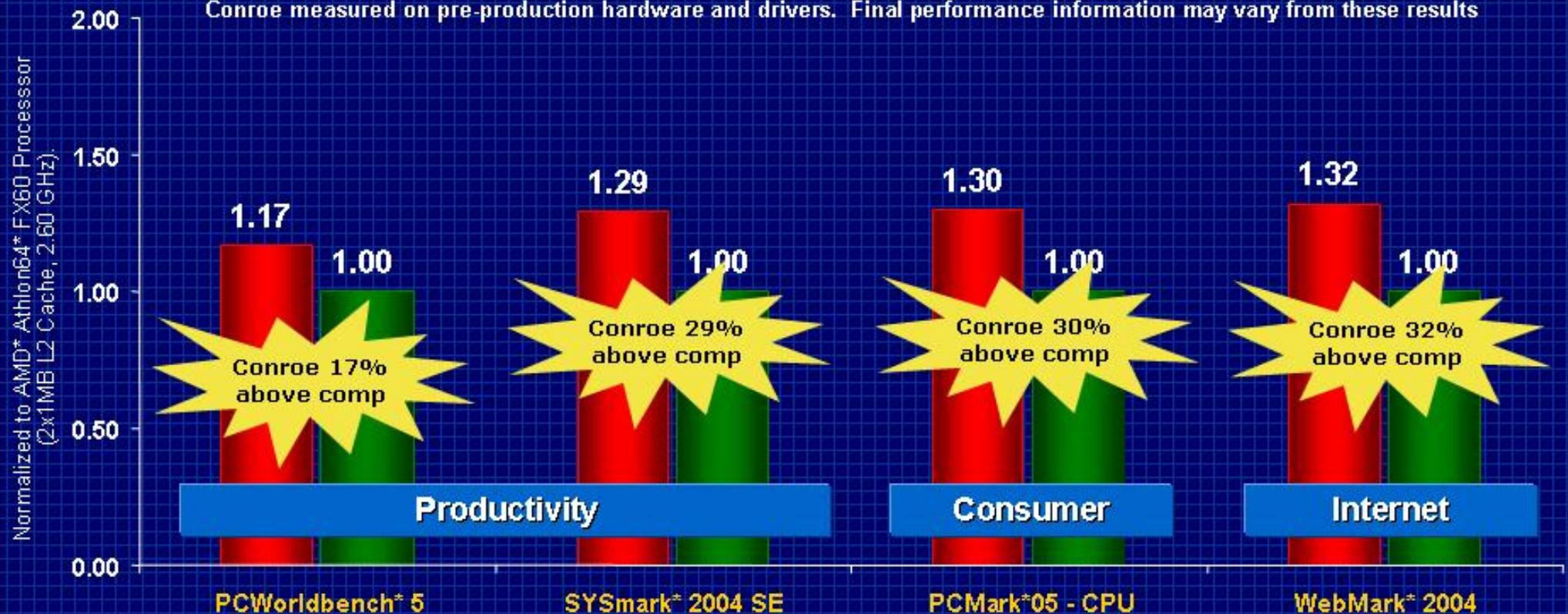


# High Performance "Conroe" Benchmarks

Pre-Production Processor Code-Name  
"Conroe" (4 MB L2, 2.66 GHz, 1066 MHz FSB)

AMD\* Athlon64\* FX60 Processor  
(2x1 MB L2 Cache, 2.60 GHz)

Conroe measured on pre-production hardware and drivers. Final performance information may vary from these results



## Conroe = uncommon performance on common tests

**Source: Intel. Configuration:** Pre-Production Processor code-name "Conroe" (4MB L2 Cache, 2.66 GHz, 1066 MHz FSB), Intel® i955XE Chipset, Intel CGRVP-EV Desktop Board, BIOS: VVPLI749; Memory 1GB DDR2 667 5-5-5-15 (2x512MB); Intel® Chipset Software Installation Utility 7.0.0.1019; **AMD\* Athlon\* 64 FX60** (2x 1MB, 2.60 GHz), nVidia\* nForce4\* Chipset, Asus\* A8N-SLI Deluxe Desktop Board, BIOS: Asus 1011, Memory 1GB DDR 400 2.5-3-3-5 (2x512MB); nVidia nForce unified driver 6.31 chipset installation file; **All Platforms** - ATI\* Radeon\* X850 XT PCIe, ATI Catalyst 5.4 Driver Suite: Display driver version: 6.14.10.6525, Maxtor\* DiamondMax\* 10 6B300S0 300GB NCQ Serial ATA (7200 RPM, 16MB cache), DirectX 9.0c, Operating System: Windows XP Professional Build 2600 SP2 NTFS. *Performance tests and ratings are measured using specific computer systems and/or components and reflect the approximate performance of Intel products as measured by those tests. Any difference in system hardware or software design or configuration may affect actual performance. Buyers should consult other sources of information to evaluate the performance of systems or components they are considering purchasing. For more information on performance tests and on the performance of Intel products, visit <http://www.intel.com/performance/resources/index.htm>*

\*Other names and brands may be claimed as the property of others





# "Conroe" in the Press

**"... Intel is poised to change the face of the desktop computing landscape."**

[HotHardware.com](http://HotHardware.com)

March 9 2006

**"... we have to say that Intel have a major performance lead ..."**

[Hexus.net](http://Hexus.net)

March 9 2006

**"Intel Regains the Performance Crown."**

[Anandtech.com](http://Anandtech.com)

March 8 2006

**"... Intel Dishes the Knockout Punch to AMD with Conroe ..."**

[GDHardware.com](http://GDHardware.com)

March 9 2006



# Win Entry Level PC





# Low Power Advantage Innovative Form Factors



# PC Silicon Growth



Consumer PC  
Growth  
**>10%**  
in 2006\*

**Increased  
Si  
Footprint**

**Win Back MSS**

Sources: \*Gartner, IDC





# New with Core 2 Duo PC Silicon Growth



Consumer PC  
Growth  
**> 10%**  
in 2006\*

**Increased  
Si  
Footprint**

**Win Back MSS**

Sources: \*Dataquest, IDC, Intel. 2006 Estimates.



# Strategy: Drive Digital & Connected Usage Model

DIGITAL

**INTEL**  
Opportunity

ANALOG

STANDALONE

CONNECTED





# Connected CE Capabilities

## Digital Broadcast Reception



Acquired The Assets Of  
Zarlink's RF Front-end  
Consumer Business

## Apps & Media Processing



XScale & Intel  
Architecture

## Display Processing



Acquired Oplus™  
Technologies

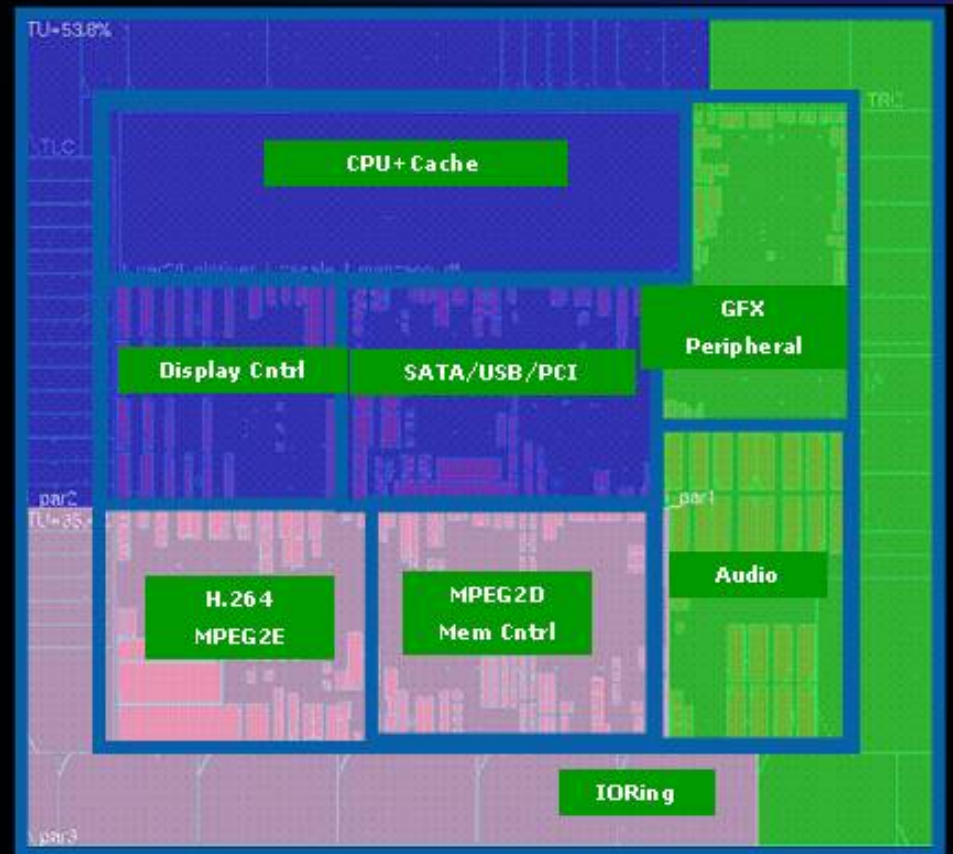
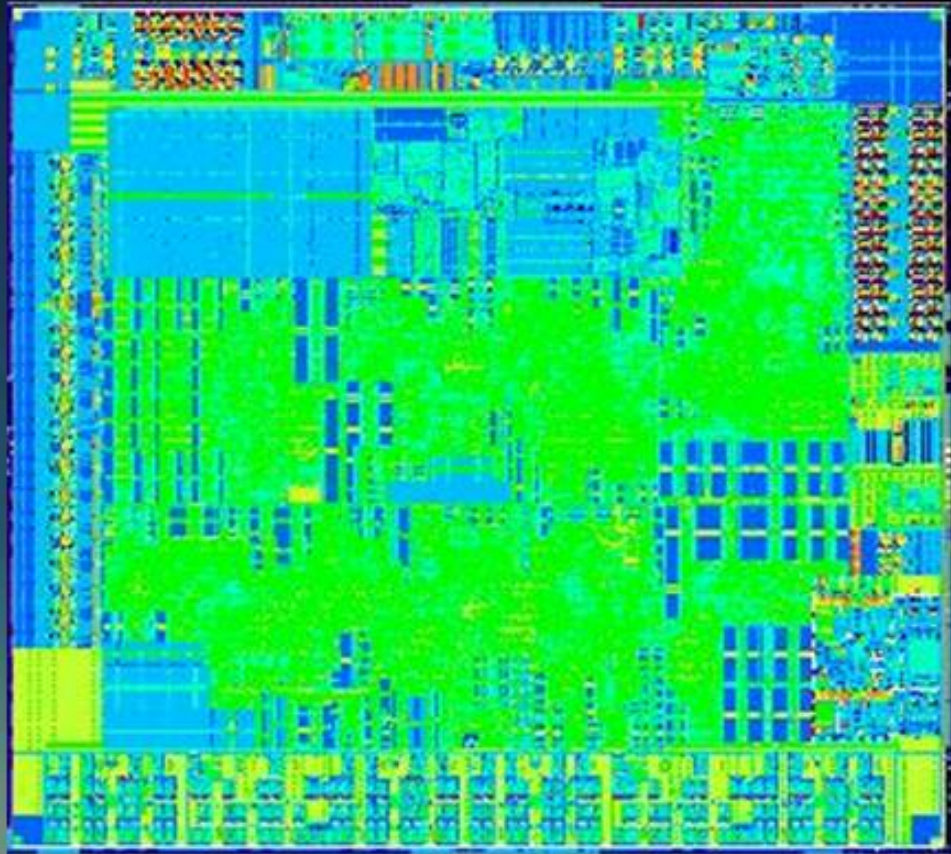


Wired/Wireless  
Networking

Internet



# Intel SoC





# Consumer Electronics Update



**Toshiba HD-DVD**



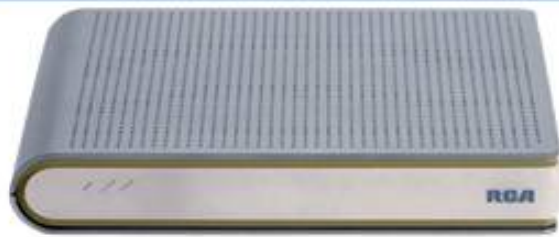
**UMPC**



**iPod**



**Handhelds**



**Thomson/RCA STB**



**BoxOne**



**Philips**



**Onkyo**



\*Other names and brands may be claimed as the property of others

# Consumer Growth Actions

- Proliferate Dual Core Everywhere
- Win with Platforms: Intel® Viiv™ Technology as the Premier Consumer PC Platform
- Win High End Gaming
- Win Entry Segment
- Make Low Power an Advantage

Digital and Connected Usage Model is Imminent  
Opening an Intel Advantage in Both PC & CE Industries







The background of the slide is a blue-tinted photograph of a modern office interior. Silhouettes of several people are visible, some standing and some sitting at desks, suggesting a busy professional environment. The lighting is dim, with light coming from windows or screens, creating a high-contrast silhouette effect.

# Intel Spring Analyst Meeting 2006

**Tom Kilroy**

Vice President and General Manager  
Digital Enterprise Group  
April 27, 2006





# Digital Enterprise Group

- Extending our leadership position in business clients
- Revolutionary new platform for business
- Regaining leadership in servers
- Tapping new segments for incremental growth



# Enterprise Environment



Security  
& Compliance



Total Cost  
of Ownership



Everything  
Over IP



Power &  
Density

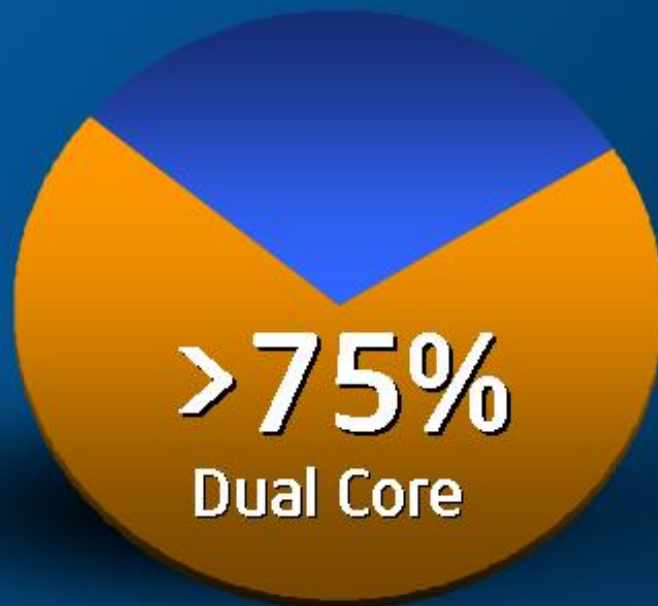


Storage  
Growth

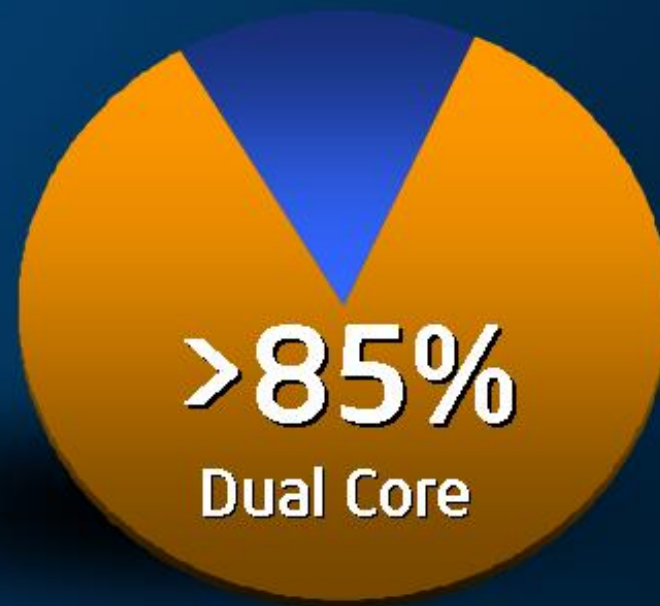


# Dual Core Acceleration

## Desktop Performance



## Server



*...by end of 2006*



# Significant Breakthrough with Conroe

**40%**  
Performance  
Improvement<sup>1</sup>



Smithfield  
2x1M Cache



Presler  
2x2M Cache



4M  
Smart Cache

**Intel® SmartCache  
Technology**  
**Intel® Intelligent  
Power Capability**

**40%**  
Lower  
Power



1...relative to Intel® Pentium® D950,



# Professional Business Platform



Intel Platform Software



**Built-in  
Management**



**Proactive  
Security**



**Energy Efficient  
Performance**





# Key Differentiators

Intel® Active  
Management  
Technology

Remotely repair down systems  
Securely update systems  
Audit powered-down PCs

Intel®  
Virtualization  
Technology

Dedicated partitions  
for security software  
Prevents malicious packets  
from entering the OS

Supported by Over 45 OEMs,  
ISVs, & IT Outsourcers



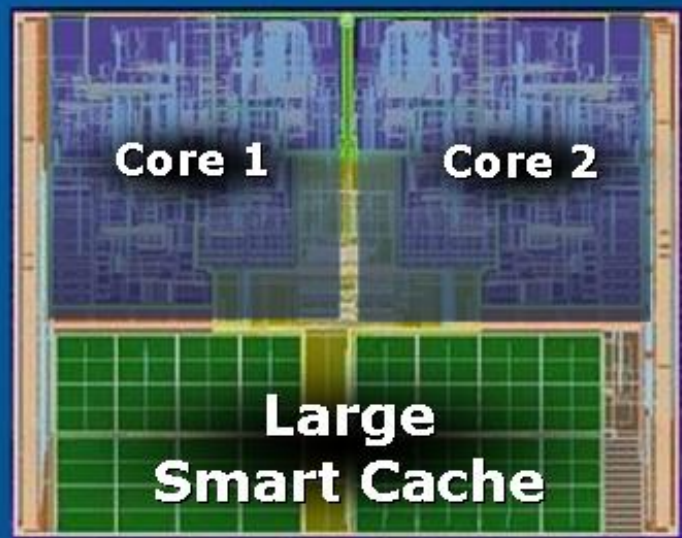


# Bensley - The Balanced DP Server Platform

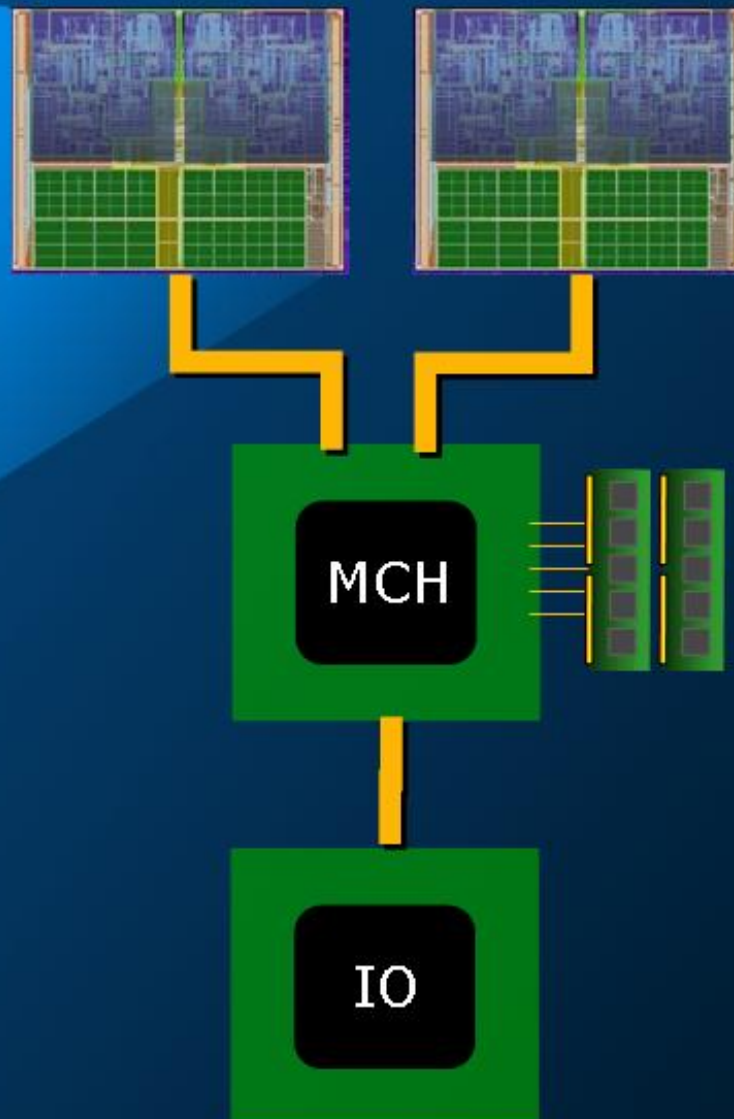


# It's all about System Level Performance

## Dual Core Performance



## Platform Innovation



## Dual Independent High-Speed Buses

*Up to 1333*

## Leading Memory Technology

*FB-DIMM*

## High Performance I/O

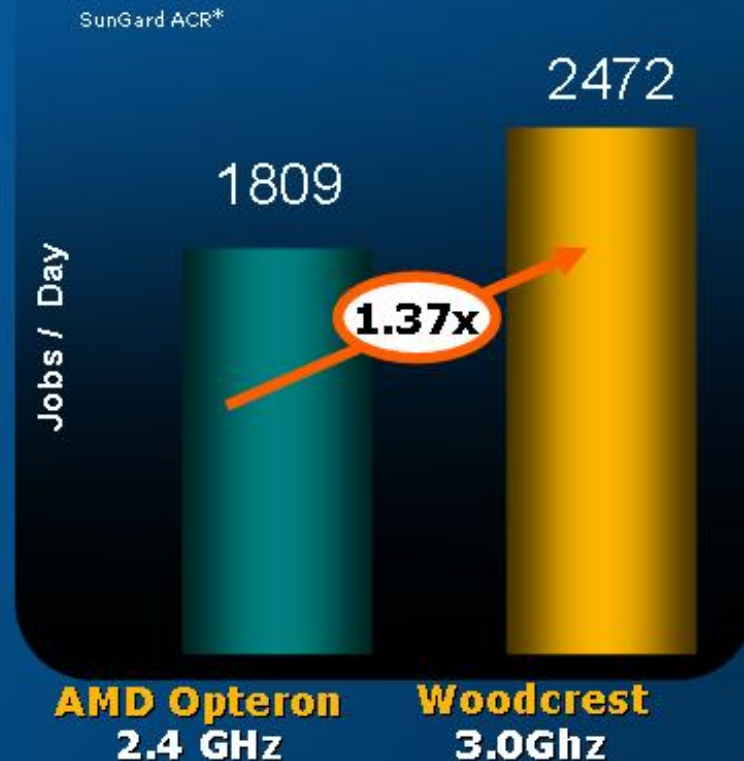
*IOAT*



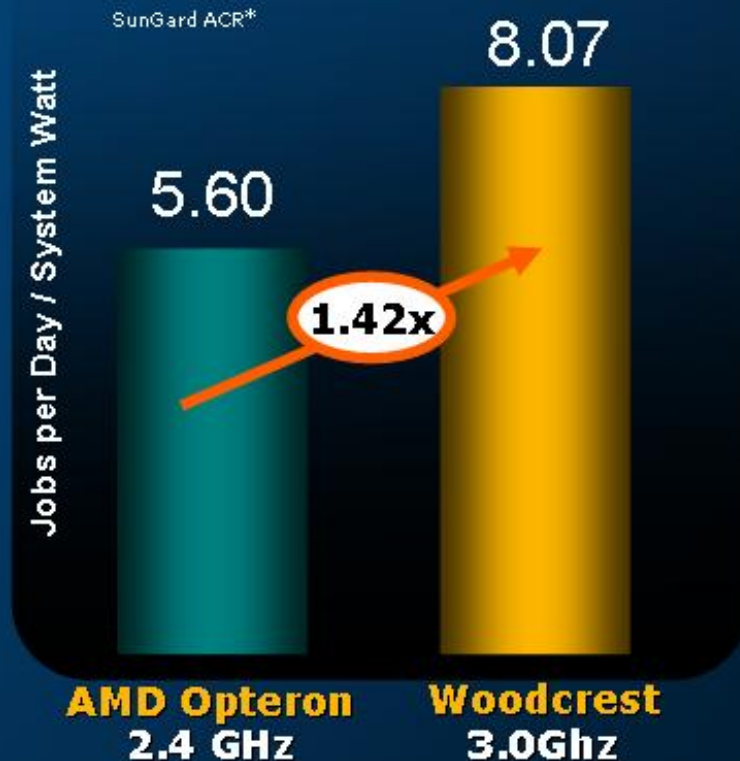


# Woodcrest - Energy Efficient Performance

## Performance



## Performance/ Watt



System Configurations: Sun X4200\* 2P Opteron\* 2.4 GHz w/ 2 GB DDR1, HP DL380G5\* 2P Woodcrest 3.0 GHz, w/ 2GB FB-DIMM

**Woodcrest delivers leading Performance and Performance/ Watt**

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# Sossaman - Leadership in Ultra Dense Servers

**SPECint\_rate /  
Sys Watt**

Relative Performance per  
watt - Higher is better

**>1.25x**

AMD Opteron  
275HE 2.2 GHz      Intel Xeon  
Processor LV 2.0Ghz

**SunGard ACR /  
Sys Watt**

**>1.30x**

AMD Opteron  
275HE 2.2 GHz      Intel Xeon  
Processor LV 2.0Ghz

**"...a dual-core  
blade with the  
industry's best  
performance per  
watt..."**

**— IBM<sup>1</sup> Feb'06**

*IBM  
BladeCenter  
HS20\**



1Source: IBM press release Feb 8, 2006 <http://www-01.ibm.com/press/us/en/pressrelease/19198.wss> System Configurations: Intel Server Pre-Production Alagash System with two Dual-Core Intel® Xeon® processor LV 2.00 GHz, 8 GB DDR2. SunGard ACR IBM BladeCenter with Dual 2.2 GHz Dual Core Opteron 275HE, 8 GB Memory, SPECint\_rate: AMD Opteron platform configuration published results at <http://www.spec.org/>. \*Other names and brands may be claimed as the property of others. All products, dates, and figures are preliminary and are subject to change without any notice. Performance tests and ratings are measured using specific computer systems and/or components and reflect the approximate performance of Intel products as measured by those tests. Any difference in system hardware or software design or configuration may affect actual performance. Buyers should consult other sources of information to evaluate the performance of systems or components they are considering purchasing. For more information on performance tests and on the performance of Intel products, visit <http://www.intel.com/performance/resources/limits.htm> or call (U.S.) 1-800-628-8686 or 1-916-356-3104.





# Truland

## The MP Consolidation Platform

**Intel® Virtualization Technology  
Leadership RAS**

**2H'06  
Tulsa Processor**

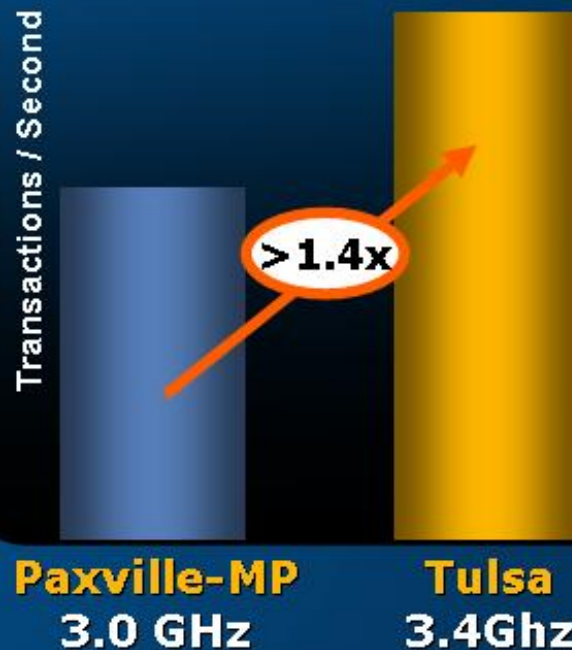
**16MB Shared On-die Cache  
Cache Reliability Advancements**



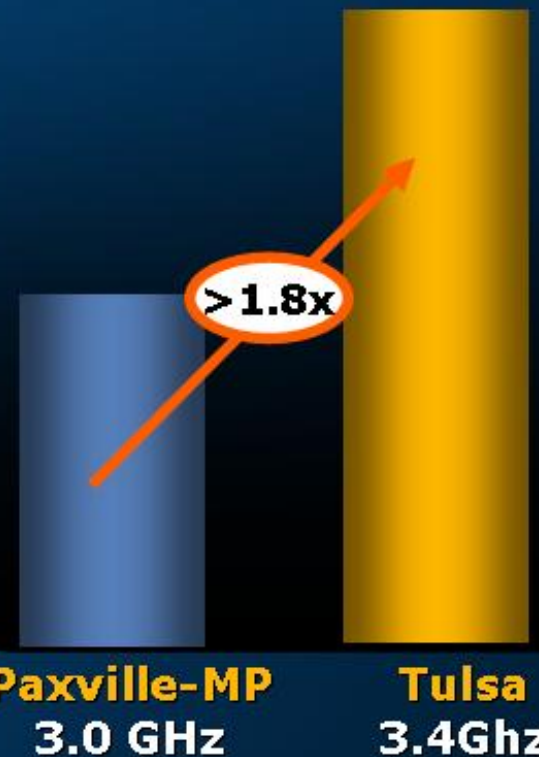
# Tulsa Performance

OLTP

Relative Performance  
Transactions / Second



SPECjbb



System Configurations: Tulsa platform: Tulsa A1 3.33 GHz w/ 16M L2/ Twincastile chipset/ 667 MHz FSB. Paxville MP platform: Paxville 3.00 GHz w/ 2x2M L2 /Twincastile chipset/ 800 MHz FSB. All products, dates, and figures are preliminary and are subject to change without any notice. Copyright © 2006, Intel Corporation. Performance tests and ratings are measured using specific computer systems and/or components and reflect the approximate performance of Intel products as measured by those tests. Any difference in system hardware or software design or configuration may affect actual performance. Buyers should consult other sources of information to evaluate the performance of systems or components they are considering purchasing. For more information on performance tests and on the performance of Intel products, visit <http://www.intel.com/performance/resources/limits.htm> or call (U.S.) 1-800-628-8686 or 1-916-356-3104.

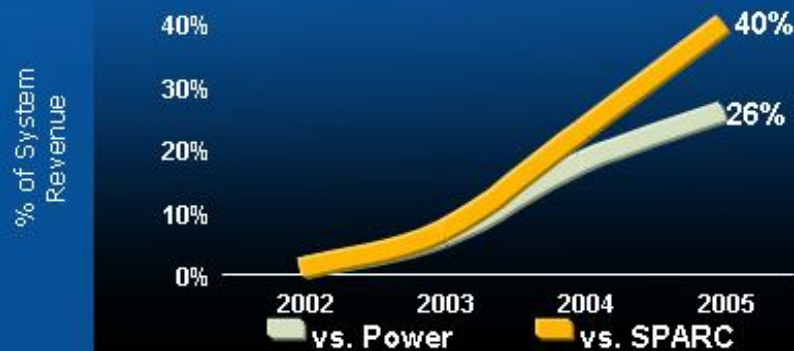




# Itanium® Momentum

## Gaining System Revenue Share

Annualized Revenue Growth Comparison of Itanium vs. RISC Architectures



Source: IDC

## \$10B ISA investment '06-'10



## 2x Applications YoY



Source: Itanium Solutions Alliance

## Performance Growing



<sup>1</sup>Source: [www.tpc.org](http://www.tpc.org) : IBM eServer p5 570 4P, POWER5 1.9GHz, 4P, 128 GB memory, Oracle Database 10g Enterprise Edition, IBM AIX 5L V5.3, result of 201,439 tpmC \$1.93/tpmC, published on 10/17/05. <sup>2</sup>Source: [www.spec.org](http://www.spec.org) : IBM System p5 550Q, POWER5+, 1.5Mhz, 2x16MB unified (all chip)/QCM, 2 QCMs in SUT L3 Cache, 16GB memory, result of 91,806 BOPS was published on Sept'24 2005. Intel Servers Based on Platforms based on Itanium 2 Montecito @533 Mhz FSB All products, dates, and figures are preliminary and are subject to change without any notice. Copyright © 2006, Intel Corporation. Performance tests and ratings are measured using specific computer systems and/or components and reflect the approximate performance of Intel products as measured by those tests. Any difference in system hardware or software design or configuration may affect actual performance. Buyers should consult other sources of information to evaluate the performance of systems or components they are considering purchasing. For more information on performance tests and on the performance of Intel products, visit <http://www.intel.com/performance/resources/limits.htm> or call (U.S.) 1-800-628-8686 or 1-916-356-3104. \*Other names and brands may be claimed as the property of others.



# Everything Over IP

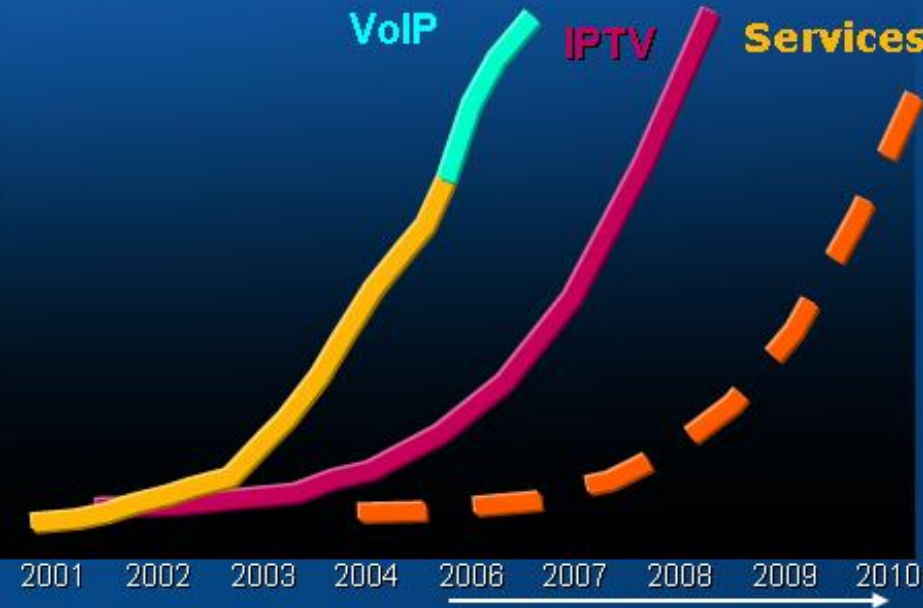
VoIP

IPTV

Services

## New Services

VoIP IPTV Services



Source: Skype, In-Stat, Intel

FORECAST

## Telecom Server Growth

ATCA Comm CGRMS



Source: Intel

FORECAST





# New Growth Areas

Storage

OEM



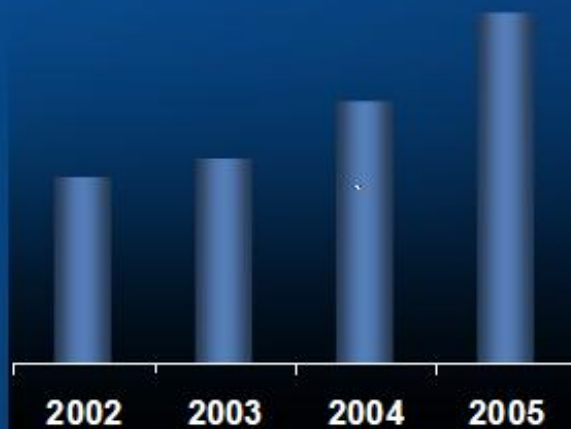
SMB



SOHO

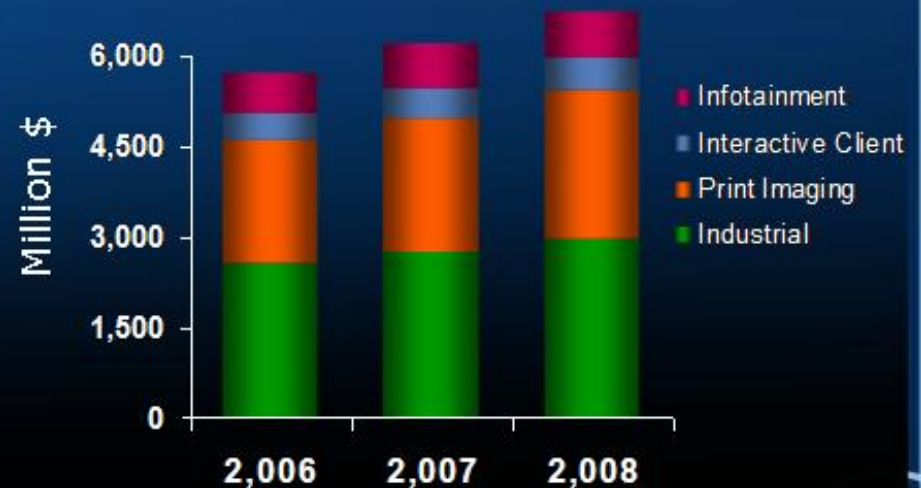


*Our Business Today*



Source: Intel

*The Opportunity Ahead*



Source: IMS, IHL, Summit Research, IDC



# Summary

- Extending leadership in business and reinventing the client with vPro™
- It's all about system level performance
- Poised to gain MSS with new server lineup





# Risk Factors

This presentation contains forward-looking statements that involve a number of risks and uncertainties. These statements do not reflect the potential impact of any mergers, acquisitions, divestitures, investments or other similar transactions that may be completed in the future. The information presented is accurate only as of today's date and will not be updated. In addition to any factors discussed in the presentation, the important factors that could cause actual results to differ materially include the following: Intel operates in intensely competitive industries that are characterized by a high percentage of costs that are fixed or difficult to reduce in the short term, and by product demand that is highly variable and difficult to forecast. Revenue and the gross margin percentage are affected by the timing of new Intel product introductions and the demand for and market acceptance of Intel's products; actions taken by Intel's competitors, including product offerings, marketing programs and pricing pressures; Intel's ability to respond quickly to technological developments and to incorporate new features into its products; and the availability of sufficient inventory of Intel products and related components from other suppliers to meet demand. Factors that could cause demand to be different from Intel's expectations include customer acceptance of Intel and competitors' products; changes in customer order patterns, including order cancellations; changes in the level of inventory at customers; and changes in business and economic conditions. The gross margin percentage could vary from expectations based on changes in revenue levels; product mix and pricing; variations in inventory valuation, including variations related to the timing of qualifying products for sale; excess or obsolete inventory; manufacturing yields; changes in unit costs; capacity utilization; impairments of long-lived assets, including manufacturing, assembly/test and intangible assets; and the timing and execution of the manufacturing ramp and associated costs, including start-up costs. Expenses, particularly certain marketing and compensation expenses, vary depending on the level of demand for Intel's products and the level of revenue and profits. The tax rate expectation is based on current tax law and current expected income and assumes Intel continues to receive tax benefits for export sales. The tax rate may be affected by the closing of acquisitions or divestitures; the jurisdictions in which profits are determined to be earned and taxed; changes in the estimates of credits, benefits and deductions; the resolution of issues arising from tax audits with various tax authorities; and the ability to realize deferred tax assets. Gains or losses from equity securities and interest and other could vary from expectations depending on equity market levels and volatility; gains or losses realized on the sale or exchange of securities; impairment charges related to marketable, non-marketable and other investments; interest rates; cash balances; and changes in fair value of derivative instruments. Dividend declarations and the dividend rate are at the discretion of Intel's board of directors, and plans for future dividends may be revised by the board. Intel's dividend and stock buyback programs could be affected by changes in its capital spending programs, changes in its cash flows and changes in the tax laws, as well as by the level and timing of acquisition and investment activity. Intel's results could be impacted by unexpected economic, social and political conditions in the countries in which Intel, its customers or its suppliers operate, including security risks, possible infrastructure disruptions, health concerns, natural disasters and fluctuations in foreign currency exchange rates. Intel's results could be affected by adverse effects associated with product defects and errata (deviations from published specifications), and by litigation or regulatory matters involving intellectual property, stockholder, consumer, antitrust and other issues, such as the litigation and regulatory matters described in Intel's SEC reports. Intel's results could be affected by the amount, type, and valuation of share-based awards granted as well as the amount of awards cancelled due to employee turnover and the timing of award exercises by employees. Please refer to Intel's most recent Earnings Release and most recent Form 10-K or 10-Q filing for more information on the risk factors that could cause actual results to differ.







Leap ahead™